

FIGURE 1

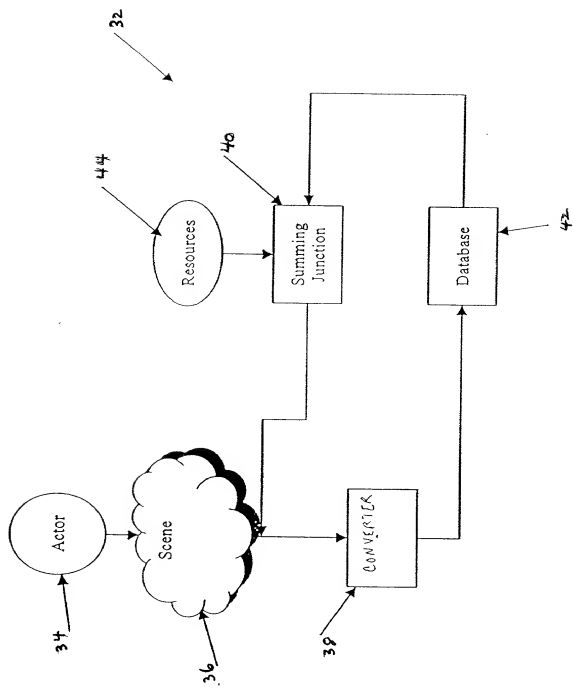
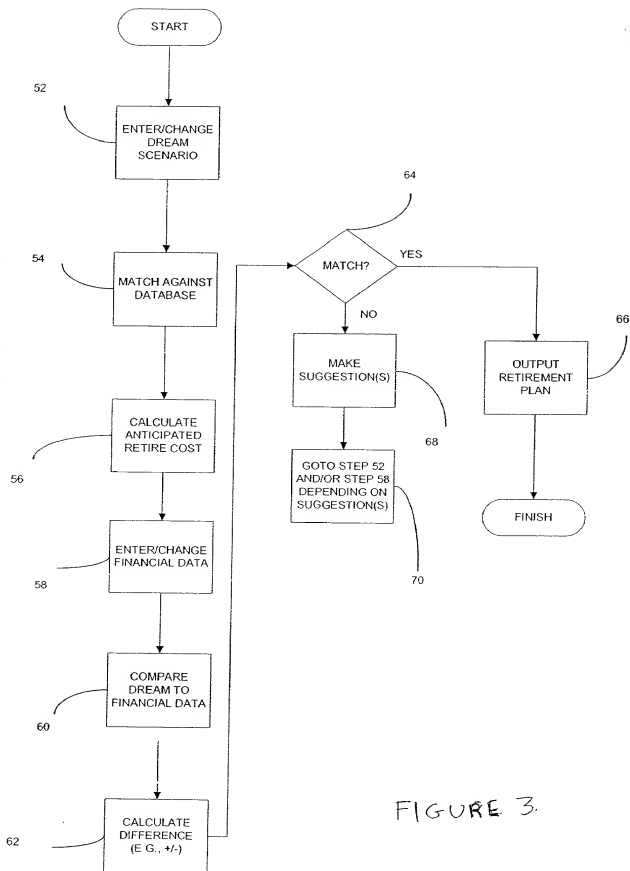


FIGURE 2



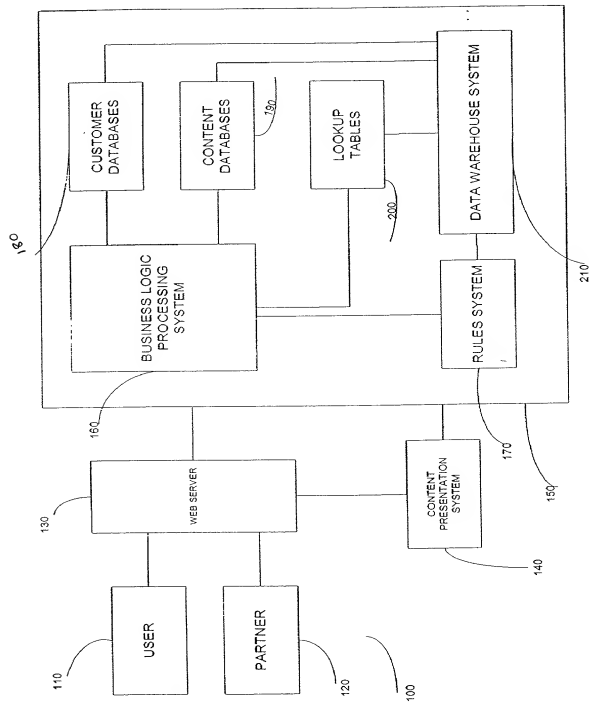


FIGURE 4

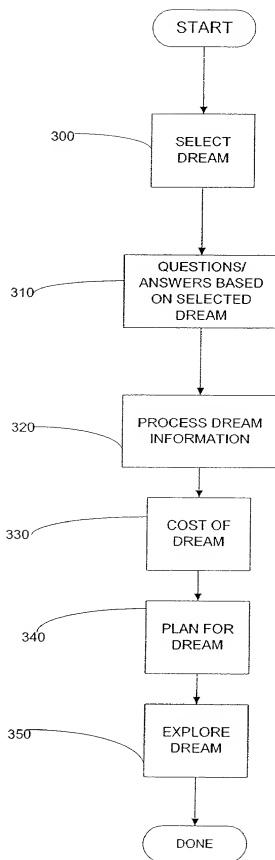


FIGURE 5

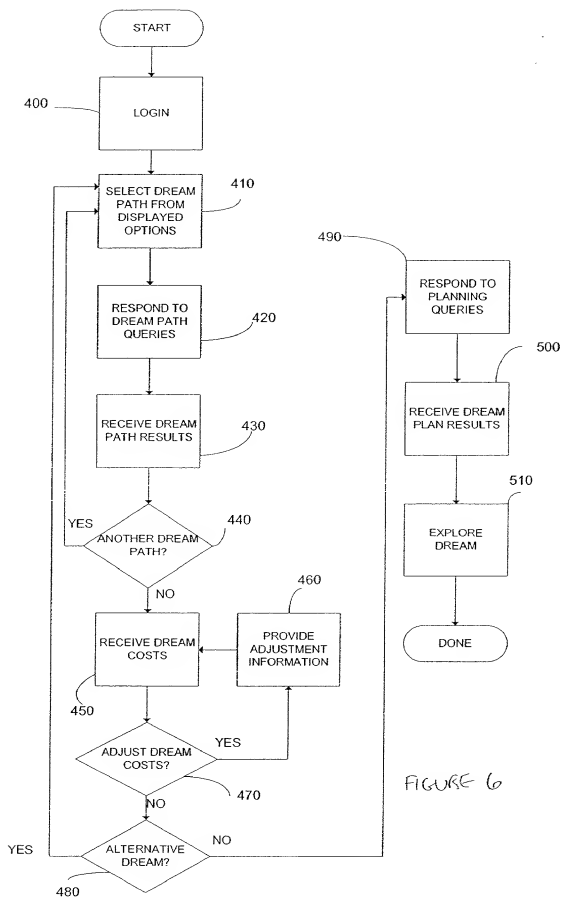


FIGURE 6

```

graph TD
    START([START]) --> 600[RECEIVE USER LOGIN]
    600 --> 610[PROVIDE DREAM PATH OPTIONS]
    610 --> 620[QUERY USER BASED ON SELECTED DREAM PATH]
    620 --> 630[RECEIVE USER RESPONSES]
    630 --> 640[DETERMINE MATCHING SOLUTIONS]
    640 --> 650[PROVIDE RESULTS TO USER]
    650 --> 660{ANOTHER DREAM PATH?}
    660 -- YES --> 610
    660 -- NO --> 680[DETERMINE/ADJUST DREAM REQUIREMENTS]
    680 --> 690[PROVIDE DREAM REQUIREMENTS TO USER]
    690 --> 700{ADJUSTMENT REQUIRED?}
    700 -- YES --> 680
    700 -- NO --> 710{ANOTHER DREAM?}
    710 -- YES --> 680
    710 -- NO --> 720[BEGIN DREAM PLAN]
    720 --> 730[QUERY USER BASED ON DREAM COSTS]
    730 --> 740[OPTIONAL LINK TO USER FINANCIAL DATA]
    740 --> 750[CREATE/ADJUST DREAM PLAN]
    750 --> 760[PROVIDE PLAN FOR DREAM TO USER]
    760 --> 770{ADJUSTMENT REQUIRED?}
    770 -- YES --> 750
    770 -- NO --> 780[EXPLORE DREAM]
    780 --> 790[PROVIDE DREAM INFORMATION/ LINKS TO USER]
    790 --> FINISH([FINISH])
  
```

FIGURE 7

FIGURE 7

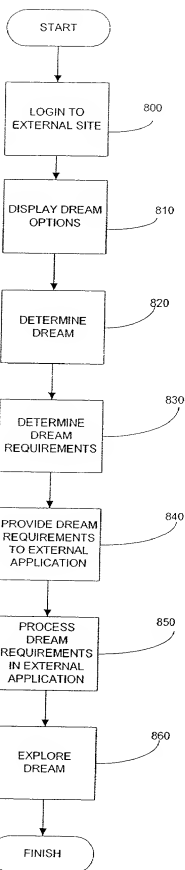
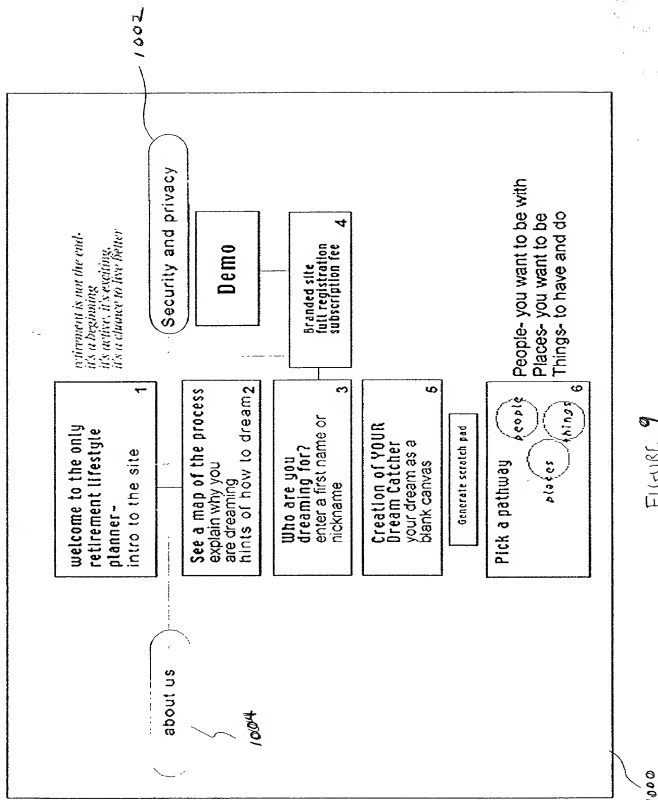
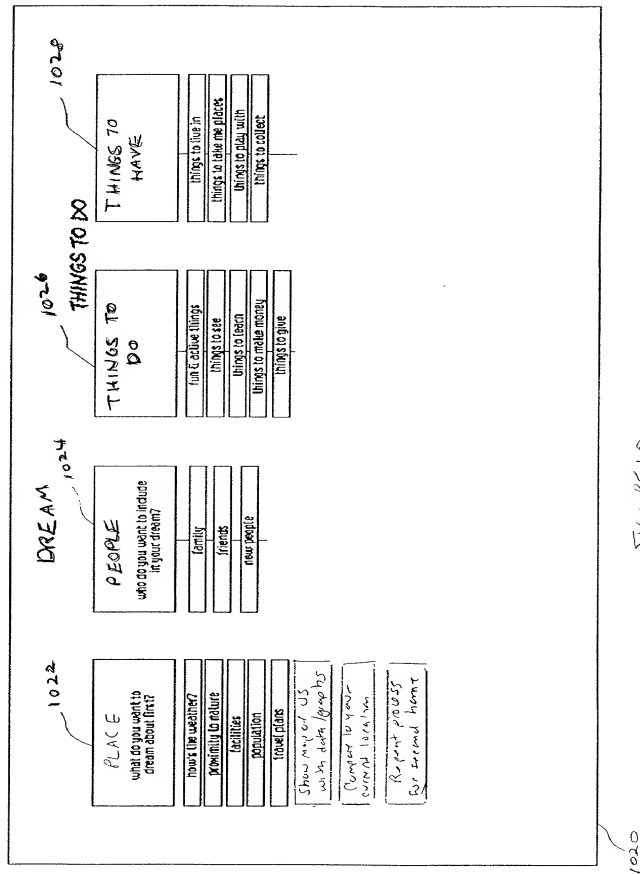


FIGURE 8





## PLACE

what do you want to  
dream about first?

primary residence secondary residence U.S. travel destination

how's the weather?

in mid-winter

temperature should be

any cold mild hot  
30 or lower 80 or higher

amount of rain

if they pick cold then this says "snow"

any light mild heavy

humidity

any low mild high

sunshine

any cloudy mixed always sunny

wind

any calm mild windy

in mid-summer

temperature should be

any cold mild hot  
30 or lower 80 or higher

amount of rain

if they pick cold then this says "snow"

any light mild heavy

humidity

any low mild high

sunshine

any cloudy mixed always sunny

wind

any calm mild windy

go through  
rewording columns

Figure 11



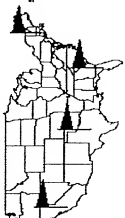
summary screen

so far, your choices to live are:

- temperature - hot
- humidity - low
- fresh water - live here
- places of worship - must have

Are there things  
you  
want to change?

here are the places that best fit  
your preferences to far



place more info

1. county 1. ca  
2. county 2. tx  
3. county 3. fl  
4. county 4. ct

• show the next 4 suggestions

I want to make adjustments ▲

place description  
facts & figures  
& charts

I want to compare this to where I live now

I want to look at my other choices

FIGURE 13

toms dream

people

places

things

how important is it for you to include in your dream

family	current friends	new people
<div style="display: flex; justify-content: space-between; width: 100%;"> <div>_____</div> <div>+</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; width: 100%;"> <span>doesn't matter</span> <span>important</span> </div>	<div style="display: flex; justify-content: space-between; width: 100%;"> <div>_____</div> <div>+</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; width: 100%;"> <span>doesn't matter</span> <span>important</span> </div>	<div style="display: flex; justify-content: space-between; width: 100%;"> <div>_____</div> <div>+</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; width: 100%;"> <span>doesn't matter</span> <span>important</span> </div>

FIGURE 14

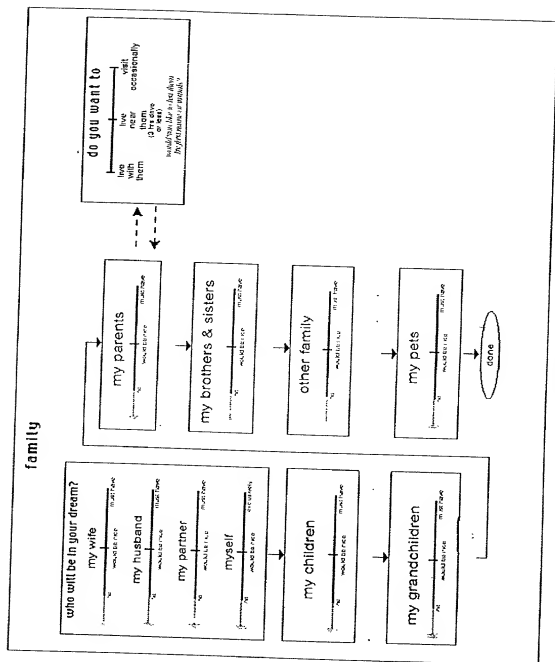


FIGURE 15

9-11/36-14

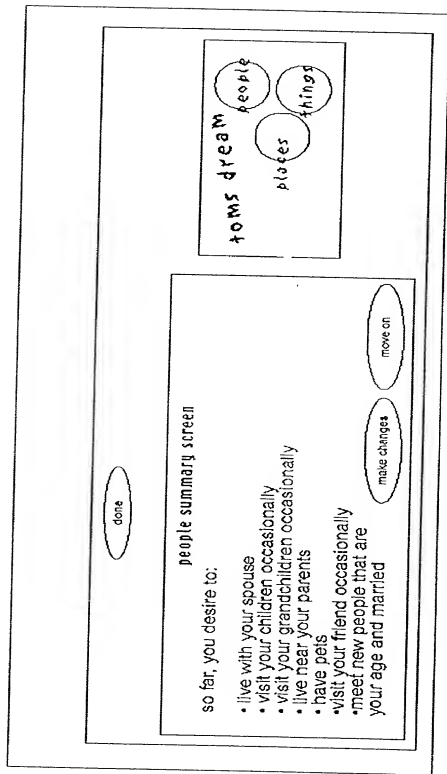


FIGURE 17

# THINGS- to do

what types of activities are important to you?

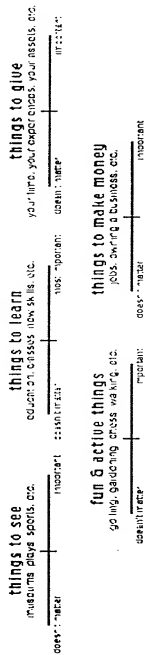


Figure 18

## active things

let us help you pick an activity

I want to do them...

don't care inside both outside

don't care with a lot of people both alone

don't care on land both on water

don't care warm both cold weather

don't care with my mind both with my body

I know what I want.  
show me a list of activities

## things to see

what would you like to see

don't care cultural events  
multicare

don't care sporting events  
multicare

don't care nature  
multicare

I know what I want.  
show me a list of things to see



## things to give

what would you like to give

not interested to my community family both

my experience knowledge

not interested to my community family both

not interested to my assets children family both

## things to learn

would you like to learn...

NA for professional purposes both personal benefit

NA for fun both for official credit

NA from friends & neighbors at a non-mutually associated class or institution

## things to make money

how would you like to make money

no way job part time full time

no way my own business maybe definitely

no way my investments maybe definitely

FIGURE 19

## main things to do summary screen

here is a summary of the things  
you've picked that you want to do.  
feel free to go back and add, take  
out or make any changes that you  
want to make.

when you are ready to move on,  
click here [move on](#)

the activities you'd like to participate in are:

- play golf often
- make baskets underwater often
- play basketball occasionally

[make changes](#)

things you'd like to see:

- plays often
- nat'l parks occasionally
- pro football occasionally

[make changes](#)

things you'd like to learn:

- at an accredited institution
- for professional purposes
- for fun

[make changes](#)

you'd like to make money by:

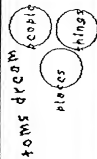
- starting your own business
- starting to invest

[make changes](#)

you'd like to give your:

- time to the community
- assets to charities and family

[make changes](#)



# THINGS to have

## what new things do you want to have?

### things to take me places

for boat motorcycle plane, etc.  
 doesn't matter what size

### things to play with

electronics gadgets sports equipment, pets, etc.  
 doesn't matter what size

### things to collect

stamps, antiques, art, etc.  
 doesn't matter what size

## THINGS TO LIVE IN

### what sort of residence do you want?

NA stationary boom mobile  
 NA small boom large  
 NA on land boom on water

I know what I want.  
 show me a list of options

index of options

## THINGS TO TAKE ME PLACES

### do you want to travel:

by water by land by air

I know what I want.  
 show me a list of options

index of options

## THINGS TO PLAY WITH

### do you want your playthings to be:

no alive yes  
 not really fun definitely

functional

high-tech

I know what I want.  
 show me a list of options

index of options

## THINGS TO COLLECT

### do you want your collectibles to be:

no alive yes  
 not really fun definitely

an investment

of sentimental value

old or new?

I know what I want.  
 show me a list of options

index of options

FIGURE 21



## toms dream

what does your dream cost?

When you want to start your new life?

in 17 years  
2034-2051

Place People Things When Summary

## toms dream

Your place

Golden, Colorado

8500 sq. ft. - 2 acres of land.  
6 months a year

\$1200 per month

adjust

omit

explore your cost

Malibu, California

condo near the ocean.  
6 months a year

\$2000 per month

adjust

omit

explore your cost

Your tasks

visits to grandchildron

\$700 per month

adjust

omit

explore your cost

Your things to do

soc shows

\$60 per week

adjust

omit

explore your cost

Your things to have

boat

\$400 per month

adjust

omit

explore your cost

17 years from now, adjust in the year 2017 you will  
be able to realize your dream for a ballpark budget of

\$6460/month

how can  
you save  
on expenses

how are you feeling right now?

+

comfortable scored

I want to plan for my dream

I want another dream

I want to explore my options

I want to save my dream

When Place People Things Summary

# Financial Plan Lite Calculator

## Tom's dream

1) What is your total household income?	<input type="text"/>
2) How much of that do you expect to save each year?	<input type="text"/>
- In your retirement plan (401k, 403b, 457, IRA, etc.)	<input type="text"/>
- Other (stocks, bonds, mutual funds, CDs, etc.)	<input type="text"/>
3) How much in savings do you currently have?	<input type="text"/>
- In your retirement plan (401k, 403b, 457, IRA, etc.)	<input type="text"/>
- Other (stocks, bonds, mutual funds, CDs, etc.)	<input type="text"/>
4) What is the value of the house(s) & property you own?	<input type="text"/>
- approximate market value	<input type="text"/>
- approximate mortgage debt	<input type="text"/>
5) Years to retirement	<input type="text"/>
- your current age	<input type="text"/>
- the age you want to retire at	<input type="text"/>
6) What annual investment rate of return do you want to assume?	<input type="text"/>
(choose a rate of return before taxes)	<input type="text"/>
- for your retirement plan assets	<input type="text"/>
- for your other assets	<input type="text"/>

input summary options

FIGURE 24

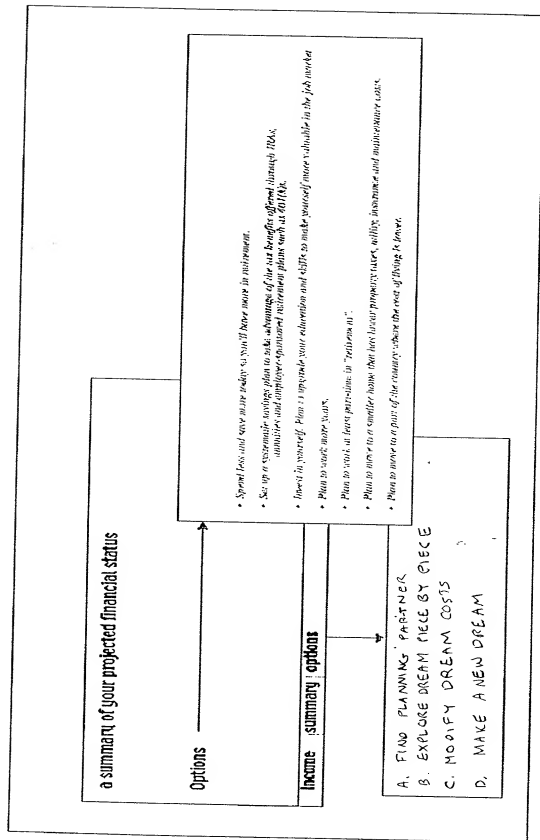


FIGURE 25

FIGURE 26

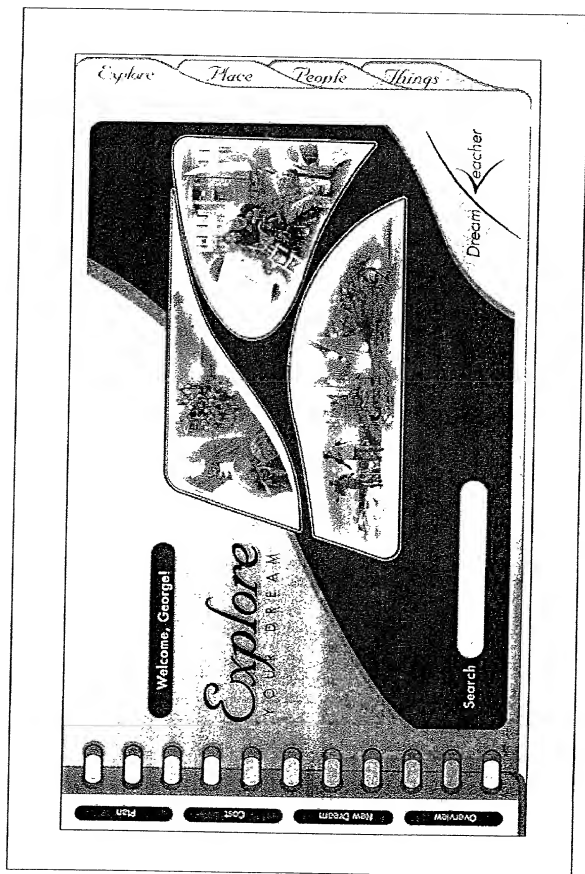


FIGURE 27